

2. Project Title: Connecting to Collections

3. Partners:

Wisconsin Historical Society (WHS), Wisconsin Federation of Museums (WFM), and Wisconsin Library Services (WiLS)

4. Overview:

The Department of Public Instruction (DPI) worked with its partners to meet the grant goals by reviewing existing Wisconsin survey and research materials, assessing high priority conservation and preservation needs in institutions of all sizes throughout the state, fostering discussion and collaboration to preserve physical historical materials, involving institutions in the formation of a disaster preparedness and response network, and developing a final report and plan. DPI appointed an advisory committee, established a project website and hired the Midwest Art Conservation Center to design and conduct a survey, carry out focus groups and prepare a final report. During the survey period, 408 individuals from 391 Wisconsin collecting institutions responded to the online survey. The 37% participation rate lends credibility to the needs assessment of Wisconsin's collecting institutions. The focus group meetings were held in geographically diverse locations, from rural and metropolitan institutions, and represented many types of collections. In total, 35 directors and collection managers participated in these meetings.

5. Project Activities:

An advisory committee was formed to provide on-going advice on the statewide assessment method and plan. This committee also formed the initial collaboration among the varying types of collecting institutions throughout the state.

MACC conservators and preservation specialists reviewed surveys and findings from past MACC initiated assessments, the HHI, the Connecting to Collections assessments from Minnesota, and North and South Dakota, and had numerous dialogues with other states about their Connecting to Collections' findings and the effectiveness of their assessment instruments. The Midwest Art Conservation Center (MACC) developed an initial survey instrument which was reviewed by the advisory committee and further refined to make it as clear, straightforward, and useful as possible.

The broadest, most comprehensive listing available of Wisconsin collecting institutions was compiled for surveying. Contacts were drawn from MACC's large database of Wisconsin collecting institutions and collection managers after comparison with the databases of the project partners for accuracy and completeness. 1,055 institutions (museums, historical societies, tribal community collections, libraries, archives and living collections) were invited to participate in the survey.

The survey was conducted using an on-line survey tool. Each institution received an initial survey invitation and weekly participation-prompting emails describing the project and the survey. Members of the advisory committee further encouraged participation by sending the survey link to their memberships. During the survey period, 408 individuals from 391 Wisconsin collecting

institutions responded to the online survey. This high (37%) participation rate lends credibility to the summative data in this needs assessment of Wisconsin's collecting institutions.

MACC was listed as the point of inquiry for any questions or difficulties that institutions might have in completing the survey. Only three simple requests for assistance were made - a sign that the survey design was generally clear and unambiguous. A copy of the survey is submitted with this report. Responses to the survey were downloaded and recorded in Excel spreadsheets. Helpful graphs and additional correlations between survey questions were also formulated and are submitted with this report.

Each institution that participated in the survey was added to a Wisconsin, statewide disaster contact database containing their current disaster contact coordinator's email and the specific county or counties where their collections reside. This information is now available to any of the partnering organizations to manage or use.

Following the survey completion in February, MACC organized and conducted regional, focus group meetings with a selection of survey participants across Wisconsin. These meetings encouraged open discussion to further the study with practical perspectives and effective methods of furthering preservation and conservation care within the state. The meetings were held in Green Bay, Merrill, Madison, and Eau Claire during March and April of 2011. The focus group participants were geographically representative, from rural and metropolitan institutions, and represented many types of collections. In total, 35 directors and collection managers participated in these meetings. A list of participants and their institutions at these focus group meetings is submitted with this report.

During the focus group meetings, the history, objectives and outcomes to date of the IMLS Connecting to Collections Initiative were presented. The Wisconsin Needs Assessment Survey results were presented and discussed with directed focus on practical solutions and the participants' past experiences in preservation and conservation improvements. Five synopses of recently funded IMLS Connecting to Collections Statewide Implementation Grants were presented, followed by group discussions on Wisconsin's needs - as found in the survey results - and the groups' practical considerations. Finally, information on granting opportunities with the IMLS and NEH were distributed along with some practical, low-cost preservation measures that institutions could take immediately.

Each of the four regional focus groups identified valuable, common elements and considerations that should be included in the formation of a statewide improvement plan. Aside from providing practical and thoughtful assistance in a plan design, these meetings fostered camaraderie and collaboration between the different institutions and a shared recognition of their need for preservation and conservation assistance, even between their distinct types of collecting institutions. Notes from these meetings are submitted with this report.

The advisory committee met again following the focus group meetings to review and discuss the survey results, the focus group findings, and to provide feedback on preliminary strategy ideas from MACC. Website pages, produced and housed by the Wisconsin Department of Public Instruction, were put in place containing MACC survey results depicted on graphs and charts, lists of the focus group participants, and the focus groups' commonly arrived upon strategies and considerations.

Based upon the survey results, the focus group meeting findings, MACC's long experience with collections care improvements, and the advisory board review and feedback, a strategic, step-by-step plan for statewide preservation initiatives was formulated.

6. Project Audience:

The audience for this needs assessment and planning effort included the 1,055 museums, historical societies, tribal community collections, libraries, archives and living collections that were identified with the help of the project partners at the beginning of the project.

For example the survey respondents represented the following institutions. The advisory committee and focus group participants helped to further interpret project needs and plans.

408 individuals from 391 institutions responded to the online survey.

40% of respondents represented libraries; 39% represented historical societies; 27% represented museums; 17% identified themselves as archives. (Some institutions had collections in more than one category.)

52% of respondents described their institutions as non-profit, non-governmental organizations, of which 72% identified as historical societies, 47% as museums, 25% as archives, and 10% as libraries. (Some institutions had collections in more than one category.)

33% of respondents listed themselves as part of county or municipal governments, of which 92% identified as libraries, 4% as archives, and 4% as museums.

10% of respondents represented academic entities. These were primarily college and university libraries and archives.

Approximately 4% of respondents represented state government and 1% represented tribal organizations. None of the respondents listed themselves as part of the federal government.

Respondents represented 68 of the 72 counties across Wisconsin.

38.6% of respondents had annual, institutional operating budgets of less than \$50,000. Of these, 81% were non-governmental, non-profit organizations, while 19% were part of larger academic or government systems. Approximately 73% of the institutions that described themselves as historical societies are working with annual budgets of \$50,000 or less and average fewer than two paid staff members. More than 63% of Wisconsin's cultural organizations are operating within budgets of \$100,000 or less each year and average fewer than two paid employees.

Operating budgets less than \$50,000	-- 38.6%
between \$50,000-100,000	-- 12.8%
between \$100,000 and 500,000	-- 22.3%
between \$500,000 and 1,000,000	-- 6.5%
between \$1,000,000 and 5,000,000	-- 11.0%
between \$5,000,000 and 10,000,000	-- 1.8%

over \$10,000,000 -- 2.3%
(Don't know/skipped question) -- 3.8%

7. Project Analysis:

There was excellent participation in the survey and focus groups as reflected in the above descriptions of the audience and activities. The significant project achievements were the survey and focus group information collected during the needs assessment. The advisory committee was especially pleased with the broad-based data that was collected which went well beyond knowledge already collected from the audience. The data will be very helpful to the Wisconsin Historical Society, the Wisconsin Federation of Museums, Wisconsin Library Services and the Department of Public Instruction as each agency determines how to best plan and carry out conferences, programs, and training sessions to meet the articulated needs. The data reflected what organizations are already doing and also provided information on high priority needs. The data is summarized in the final report. The data will allow the partners to prepare an implementation grant request.

For example the data identified the following high priority needs:

Writing a grant to fund conservation/preservation activities 72%
Emergency/Disaster Response training 69%
Improving/expanding storage areas 69%
Writing an Emergency/Disaster Response plan 67%
Writing a Long-Range Conservation Plan 65%
Obtaining a General Preservation Assessment Survey 62%
Improving handling and basic collections care techniques 62%
Improving environmental controls (heating, humidity, AC) 58%
Conservation treatments 55%
Preserving analog audio/visual collections 50%
Preserving digital collections 49%
Obtaining a Detailed Conservation Survey 47%
Obtaining environmental monitoring equipment/training 46%
Improving security measures 38%
Implementing a pest control system 28%

Only one unexpected problem occurred during the grant, but it did not substantially impact the outcome. The project implementation was delayed due to the requirement from the Wisconsin Department of Administration to bid the services required.

8. Next steps and plans to continue:

The partner organizations and others can use the needs assessment results to prepare an IMLS implementation grant request. Agencies can also utilize the website and report recommendations for their own ongoing planning and to access resources that may help them carry out conservation and preservation activities and trainings.

1. Introduction

In 2005, the Heritage Health Index Report on the State of America's Collections (HHI)¹ revealed and quantified that a large segment of the nation's cultural collections are in urgent need of conservation treatment and that preservation practices at institutions need significant improvements. In response to these findings, the Institute for Museum and Library Services (IMLS) initiated the Connecting to Collections programs to build awareness of the situation and offer statewide planning and implementation grants in order to foster cooperation among collecting institutions and conservation professionals within states.

With generous support from a 2010 IMLS Connecting to Collections Statewide Planning Grant, the Wisconsin Department of Public Instruction (Division for Libraries, Technology, and Community Learning), the Wisconsin Historical Society (WHS), the Wisconsin Federation of Museums (WFM), the Wisconsin Library Services (WiLS), and the Midwest Art Conservation Center (MACC) became project partners to develop and conduct a study to assess the current conservation and preservation needs of Wisconsin museums, historical societies, libraries, archives, and other collecting cultural institutions.

The goals of the study were to:

- identify conservation and preservation needs in Wisconsin collecting institutions;
- foster collaboration among Wisconsin collecting institutions;
- involve Wisconsin collecting institutions in the formation of a disaster preparedness and response network;
- form partnerships to support an implementation project that will benefit Wisconsin collecting institutions;
- articulate a prioritized plan of action to meet identified preservation needs.

This report summarizes the findings of that study and recommends a practical, prioritized plan of action to protect the cultural patrimony of Wisconsin and further improvements in collections care practices throughout the state.

2. Project Design

An advisory committee was formed to provide on-going advice on the statewide assessment method and plan.² This committee also formed the initial collaboration among the varying types of collecting institutions throughout the state.

¹ Available online at <http://www.heritagepreservation.org/hhi/full.html>, accessed February 8, 2011.

² Members of the advisory committee were: Sally Drew and Mike Cross, Department of Public Instruction; Kelly Herold, Buffalo County Historical Society, Kathleen Mullen, Wisconsin Historical Society; Debbie Cardinal, Wisconsin Library Services and Wisconsin Heritage Online; Felice Maciejewski, UW-Library Consultant; Nicolette Meister, Logan Museum of Anthropology; Andrea Rolich, University of Wisconsin - Madison; Colin Turner, Midwest Art Conservation Center; Josh Ranger, UW-Oshkosh Library and ARC; Anna Stadick, UW-Parkside Archives and ARC; Jan Mirenda Smith, Bergstrom-Mahler Museum/WFM; Monique Tyndall, College of Menominee Nation Green Bay and Keshena; Nicolas Reynolds, Oneida Nation; Cathy Markwiese, Milwaukee Public Library; Stacy Stevens, T. B. Scott Free Library; Brady Roberts, Milwaukee Art Museum; and Janet Seymour, Wisconsin Historical Society.

An initial survey instrument was developed by the Midwest Art Conservation Center. MACC conservators and preservation specialists reviewed surveys and findings from past MACC initiated assessments, the HHI, the Connecting to Collections assessments from Minnesota, and North and South Dakota, and had numerous dialogues with other states about their Connecting to Collections' findings and the effectiveness of their assessment instruments. After MACC's survey development, the advisory committee members met, reviewed and further refined the survey in order to make it as clear, straightforward, and useful as possible.

The broadest, most comprehensive listing available of Wisconsin collecting institutions was compiled for surveying. Contacts were drawn from MACC's large database of Wisconsin collecting institutions and collection managers after comparison with the databases of the project partners for accuracy and completeness. 1,055 institutions (museums, historical societies, tribal community collections, libraries, archives and living collections) were invited to participate in the survey.

The survey was conducted using an on-line survey tool³ between January 7 and February 15, 2011. Each institution received an initial survey invitation and weekly participation-prompting emails describing the project and the survey. Members of the advisory committee further encouraged participation by sending the survey link to their memberships. During the survey period, 408 individuals from 391 Wisconsin collecting institutions responded to the online survey. This high, 37% participation rate lends credibility to the summative data in this needs assessment of Wisconsin's collecting institutions.

MACC was listed as the point of inquiry for any questions or difficulties that institutions might have in completing the survey. Only 3 simple requests for assistance were made - a sign that the survey design was generally clear and unambiguous. A copy of the survey is included with this report (*Appendix A*). Responses to the survey were downloaded and recorded in Excel spreadsheets. Helpful graphs and additional correlations between survey questions were also formulated and are included in this report (*Appendix B*).

Each institution that participated in the survey was added to a Wisconsin, state-wide disaster contact database containing their current disaster contact coordinator's email and the specific county or counties where their collections reside. This information is now available to any of the partnering organizations to manage or use.

Following the survey completion in February, MACC organized and conducted regional, focus group meetings with a selection of survey participants across Wisconsin. These meetings encouraged open discussion to further the study with practical perspectives and effective methods of furthering preservation and conservation care within the state. The meetings were held in Green Bay, Merrill, Madison, and Eau Claire during March and April of 2011. The focus group participants were geographically representative, from rural and metropolitan institutions, and represented many types of collections. In total, 35 directors and collection managers participated in these meetings. A list of participants and their institutions at these focus group meetings is included with this report (*Appendix C*).

³ Available online at <http://www.surveymonkey.com>, accessed February 8, 2011.

During the focus group meetings, the history, objectives and outcomes to date of the IMLS Connecting to Collections Initiative were presented. The Wisconsin Needs Assessment Survey results were presented and discussed with directed focus on practical solutions and the participants' past experiences in preservation and conservation improvements. Five synopses of recently funded IMLS Connecting to Collections Statewide Implementation Grants were presented, followed by group discussions on Wisconsin's needs - as found in the survey results - and the groups' practical considerations. Finally, information on granting opportunities with the IMLS and National Endowment for the Humanities (NEH) were distributed along with some practical, low-cost preservation measures that institutions could take immediately.

Each of the four regional focus groups identified valuable, common elements and considerations that should be included in the formation of a statewide improvement plan. Aside from providing practical and thoughtful assistance in a plan design, these meetings fostered camaraderie and collaboration between their different institutions and a shared recognition of their need for preservation and conservation assistance, even between their distinct types of collecting institutions. Notes from these meetings are included in this report (*Appendix D*).

The advisory committee met again following the focus group meetings to review and discuss the survey results, the focus group findings, and to provide feedback on preliminary strategy ideas from MACC. Website pages, produced and housed by the Wisconsin Department of Public Instruction, were put in place containing MACC survey results depicted on graphs and charts, lists of the focus group participants, and the focus groups' commonly arrived upon strategies and considerations.

Based upon the survey results, the focus group meeting findings, MACC's long experience with collections care improvements, and the advisory board review and feedback, a strategic, step-by-step plan for statewide preservation initiatives was formulated.

3. Discussion of Survey Results

Who responded to the survey?

408 individuals from 391 institutions responded to the online survey.

40% of respondents represent libraries; 39% represent historical societies; 27% represent museums; 17% identify themselves as archives. (Some institutions have collections in more than one category.)

52% of respondents describe their institutions as non-profit, non-governmental organizations, of which 72% identify as historical societies, 47% as museums, 25% as archives, and 10% as libraries. (Some institutions have collections in more than one category.)

33% of respondents listed themselves as part of county or municipal governments, of which 92% identify as libraries, 4% as archives, and 4% identify as museums.

10% of respondents represent academic entities. These are primarily college and university libraries and archives.

Approximately 4% of respondents represent state government and 1% represents tribal organizations. None of the respondents listed themselves as part of the federal government.

Respondents represent 68 of the 72 counties across Wisconsin.

38.6% of respondents have annual, institutional operating budgets of less than \$50,000. Of these, 81% are non-governmental, non-profit organizations, while 19% are part of larger academic or government systems. Approximately 73% of the institutions that describe themselves as historical societies are working with annual budgets of \$50,000 or less and average fewer than 2 paid staff members. More than 63% of Wisconsin's cultural organizations are operating within budgets of \$100,000 or less each year and average fewer than 2 paid employees.

Operating budgets less than \$50,000	-- 38.6%
between \$50,000-100,000	-- 12.8%
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between \$1,000,000 and 5,000,000	-- 11.0%
between \$5,000,000 and 10,000,000	-- 1.8%
over \$10,000,000	-- 2.3%
(Don't know/skipped question)	-- 3.8%

What conservation/preservation activities are currently carried out in Wisconsin institutions?

60% of the respondents state they control the Temperature in their institutions, but only 27% control Temperature in all areas of their collections all year long. 33% of respondents claim they do not control Temperature in their collections at all.

51% state they control Relative Humidity to some extent in their institutions, but only 14% control Relative Humidity in all areas of their collections all year long. 42% of respondents do not control Relative Humidity in their collections at all.

52% state they control Light to some extent, but only 16% control light in all areas of their collections. 40% of respondents do not control Light in their collections at all.

51% of respondents state they monitor their environmental conditions to some extent, but only 26% monitor regularly in representative areas throughout their institutions. 46% of respondents do not monitor environmental conditions in their collections at all.

68% of institutions who have *preservation* in their organization's mission statement conduct monitoring of environmental conditions, while only 31% of those without *preservation* conduct environmental monitoring.

72% of respondents' institutions carry out some preventive preservation activities such as housekeeping at least occasionally. 60% carry out conservation treatments such as cleaning and repairing artifacts at least occasionally. 49% participate in preservation reformatting initiatives such as preservation photocopying, microfilming, or digitization. 49% preserve digital media, servers, and/or playback equipment, while

39% of respondents preserve analog audio-visual media and/or playback equipment. 42% of respondents perform preservation management activities such as planning and grant writing at least occasionally.

42% of respondents report that basic conservation treatments such as cleaning and repair of artifacts are assigned to volunteers and interns. 37% of respondents report that conservation treatments are performed by non-specialist staff members as needed. 22% of respondents report that conservation treatments are carried out by internal, dedicated preservation/conservation staff, while 20% turn to an external provider. (25% of those surveyed did not respond to this question.)

What is the state of Conservation/Preservation Policy and Planning in Wisconsin institutions?

57% of respondents report that their institution's mission statement includes a reference to the *preservation* of collections. Only 16% of respondents representing libraries, and 25% representing archives report a reference to *preservation* in their institution's mission statement, while 60% of respondents representing historical societies say there is a reference to *preservation* in their mission statements.

Of the 33% of respondents who report that some institutional money is dedicated to preservation/conservation activities each year, 22% report amounts between \$1,000-3,000, and 35% report amounts of \$1,000 or less. 63% of respondents report that no money is dedicated in their annual operating budgets for preservation/conservation activities.

Only 19% of respondents have a written Emergency/Disaster Response Plan in place that includes the collection. Of these, only 5% of institutions with annual budgets of \$50,000 or less have an Emergency/Disaster Response Plan. Even 33% of institutions with budgets of \$10,000,000 or more do not have an Emergency/Disaster Response Plan.

While 80% of respondents report they have fire/smoke alarms in their institutions, only 8% of respondents have flood/leak/water detectors at their locations.

14% of respondents have had a General Preservation Assessment Survey completed at some time. 6% of these General Preservation Assessment Surveys were completed within 7 years, while 8% were completed more than 7 years ago.

11% of respondents have had a Detailed (Item Specific or Object-by-Object) Conservation Survey completed for at least some portion of their collection.

7% of respondents have a Long Range Conservation Plan for their collection.

87% of respondents do not currently educate the public about conservation/preservation activities through their websites. 74% do not regularly include information about conservation/preservation activities in exhibitions. 68% of respondents do not currently educate donors, trustees, members or friends groups about conservation/preservation activities. 59% do not educate the public about conservation/preservation activities by responding to queries and providing recommendations.

Only 28% of respondents have applied for conservation/preservation funding from any public or private source in the past three years. The 66% of respondents who have not applied for grant assistance for conservation/preservation activities in the past three years (and the 6% that are unsure whether they had or not), indicated their barriers to applying for funding: 60% report that they lack staff time or expertise to complete a grant application, and 50% of respondents say they are unaware of an appropriate funding source. 27% of respondents indicated that their institutions have to complete some aspect of preservation planning before they are ready to apply for funding. 26% of respondents report that conservation/preservation activities are not institutional priorities, and 12% report that they have applied for grants in the past and have been discouraged by rejection.

42% of respondents report their institutions carry out preservation management activities such as planning and grant writing at least occasionally. 72% of respondents report that assistance on writing grants for conservation/preservation funding would be useful to them.

70% of respondents reported that they would be willing to devote staff or volunteer time to implement improvements if conservation/preservation resources became available at their institutions.

What types of artworks, artifacts, or materials did respondents identify as being at risk in their collections?

Books and bound volumes 56%
Unbound flat paper documents and ephemera 56%
Photographic materials 52%
Historical artifacts 48%
Textiles 47%
Analog recorded sound collections 43%
Videotapes 42%
Furniture 38%
Paintings 37%
Buildings/architecture 37%
Art on paper 36%
Digital materials 30%
Motion picture film 28%
Native American and ethnographic artifacts 21%
Sculpture 12%
Living collections 6%

What factors were identified as causing the most damage or loss of access to items at risk in collections?

Improper storage methods or materials 67%
Light 66%
Improper previous repairs (tape, glue, paint) 63%
Improper handling or transport 60%
Physical or chemical deterioration 55%
Water or moisture (liquid stains, warping) 54%
Airborne particulates or pollutants such as dust 52%

Mold/mildew 52%
Improper exhibition methods or materials 50%
Obsolescence of audio/visual/digital playback equipment 46%
Theft 43%
Pests 42%
Vandalism 36%
Fire (including soot and smoke) 27%

What sources of conservation/preservation information did respondents say they are most likely to use?

Colleagues 63%
State/County Historical Societies 55%
Publications 47%
Websites 47%
Workshops 42%
Library/Librarians 37%
Conferences 35%
Listservs 25%
Professional Associations 24%
State Historic Preservation Office (SHPO) 19%
Regional Conservation Centers 16%
Independent Conservators 15%
National Park Service Conserve-O-Grams 13%
Canadian Conservation Institute (CCI) Notes 11%

What methods of delivery for Conservation/Preservation instruction did respondents report would be effective for their institutions?

65% of respondents believe individual on-site visits and instruction by conservation experts is an effective way to deliver conservation/preservation information. 91% of respondents consider individual instruction to be at least somewhat effective.

43% of respondents believe attending collections care workshops presented by conservation experts is effective, while 90% of respondents consider attending live workshops to be at least somewhat effective.

42% of respondents believe that published (in print or online) information and resources from conservation experts is effective, while 90% believe published resources are at least somewhat effective.

37% of respondents believe participating in online collections care workshops presented by conservation experts is effective, while 88% believe webinars are at least somewhat effective.

33% of respondents believe sharing information in networks of colleagues or peers is effective, while 86% believe it is at least somewhat effective.

77% of respondents report that no one at their institution has received formal instruction or training on conservation/preservation issues within the past 2 years.

What assistance did respondents state as a Needed Assistance at their institutions?

Writing a grant to fund conservation/preservation activities 72%
Emergency/Disaster Response training 69%
Improving/expanding storage areas 69%
Writing an Emergency/Disaster Response plan 67%
Writing a Long-Range Conservation Plan 65%
Obtaining a General Preservation Assessment Survey 62%
Improving handling and basic collections care techniques 62%
Improving environmental controls (heating, humidity, AC) 58%
Conservation Treatments 55%
Preserving analog audio/visual collections 50%
Preserving digital collections 49%
Obtaining a Detailed Conservation Survey 47%
Obtaining environmental monitoring equipment/training 46%
Improving security measures 38%
Implementing a pest control system 28%

...and as an Urgently Needed Assistance:

Improving/expanding storage areas 20.2%
Writing a grant to fund conservation/preservation activities 18.6%
Improving environmental controls (heating, humidity, AC) 12.2%
Writing an Emergency/Disaster Response plan 9.7%
Preserving analog audio/visual collections 8.4%
Obtaining a General Preservation Assessment Survey 8.3%
Obtaining environmental monitoring equipment/training 8.3%
Conservation Treatments 7.9%
Improving handling and basic collections care techniques 7.7%
Writing a Long-Range Conservation Plan 7.6%
Emergency/Disaster Response training 7.3%
Improving security measures 7.1%
Preserving digital collections 6.7%
Obtaining a Detailed Conservation Survey 5.6%
Implementing a pest control system 3.1%

Summary of Survey Results:

The survey respondents represent institutions throughout nearly all of Wisconsin's counties. They are primarily libraries, historical societies, museums, and archives. Over half the respondents represent small institutions, with annual budgets of \$100,000 or less and an average staff of less than two employees. Of all the surveyed institutions, both large and small, the likely reference to *preservation* in their mission statements varies among the institution types. Even historical societies, the most likely to have that reference, still have large numbers of institutions without such a mission. Those institutions that do reference *preservation* in their mission statements are shown to be more likely to be monitoring their

environmental conditions, allocating funds toward conservation, and indicating that their collections are at risk.

While the majority of respondents state that some preservation activities are carried out at their institutions to some degree, nearly half are not monitoring the environmental conditions for their collections and most of the conservation treatments and cleanings are conducted by non-professional staff or volunteers. Most of the respondents do report that they have fire/smoke alarms in their institutions, but only a small percentage have flood/leak/water detectors (an inexpensive and proven measure to save collections from damage). Given the dearth of environmental monitoring and controls and lack of preservation specialists reported by respondents, it is likely that Wisconsin's collections are at even a greater risk than reported. This is further borne out by the fact that only 13% of Wisconsin respondents have had a General Preservation Assessment Survey completed for their institutions.

When seeking answers to conservation/preservation questions to assist their collections, the respondents are most likely to turn to their colleagues for information, but they are not receiving the quality or quantity of information necessary to meet their needs. Additionally, respondents are far less likely to turn to regional conservation centers, independent conservators, printed publications such as National Park Service Conserve-O-Grams and Canadian Conservation Institute (CCI) Notes for conservation/preservation information, although these information sources are free and reliable. Over three quarters of those surveyed state that no one at their institution has received formal conservation/preservation training in the last 2 years. If they could, on-site visits and instruction by conservation experts was designated as the most effective delivery method for training, followed by attending workshops presented by conservation experts.

The survey indicates that there is a need for institutional and administrative development in collections preservation. Almost 2/3 of the responses represent institutions that have budgets without any preservation activity line item, less than a third have applied for conservation funding in the past, less than one fifth have an Emergency/Disaster Response Plan for their collections, and less than one tenth have a Long Range Conservation Plan.

With almost 2/3 of respondents reporting that no money is dedicated in their annual operating budgets for preservation/conservation activities, it is not surprising that high numbers of respondents showed a need for assistance in grant writing. Because successful grant writing (and requests for support in general) depends on clearly articulated goals and planning, any assistance in grant writing should include instruction on attaining and identifying an institution's preservation and conservation priorities along with assistance in developing improvement plans. Similarly, although improving and expanding storage areas was high on the list of self-described needs reported by respondents, appropriate storage improvements that correctly address a collection's needs are best identified within a General Preservation Assessment Survey and action plan.

Over two thirds of the respondents indicated a need for disaster planning and disaster training. As identified in the IMLS Connecting to Collections initiative's goals, this particular need can be considered so fundamental to a collection's preservation that it surpasses other priorities that could be shown with further assessments.

4. Focus Group Results

The focus group discussions held in Green Bay, Merrill, Madison, and Eau Claire had common elements and considerations in the formulation of a statewide preservation improvement plan. Foremost, there was consensus that any strategic improvement plan should try to do 'the most good for the most institutions' in a cost effective way. The commonly arrived on points include:

- 1) identification of the vital need for disaster planning information and instruction at Wisconsin institutions;
- 2) recognized value in regionally held workshops and training opportunities for staff and volunteers - with a hands-on component that results in nearly finished products;
- 3) a predisposition for an initial 'self-surveying' or other staff initiated assessment as a first step in identifying needs;
- 4) the view that the best methods for the dissemination of instruction and information are through already existing networks and associations;
- 5) a preference for developing and utilizing regional teams/networks for disaster efforts (in both instruction and for recovery assistance);
- 6) the need for a clear listing of good, trusted sources for preservation/conservation information and instruction;

Summary of Focus Group Results:

The focus group discussions gave important reasoning for each of these common points. Although the survey results showed significant needs in many categories, a practical concentration to achieve one or two measurable results was seen as the best use of the limited resources available in, for example, an IMLS Implementation grant. Specifically, participants agreed that a formulated plan should address *disaster planning* in a broad, statewide strategy. This is a need many found lacking in their own institutions and was seen as a fundamental improvement for any institution – aside from its being identified as a high need in the survey results.

Focus group participants were interested in the specific implementation methods for any statewide plan. They felt it was important to utilize existing networks for the dissemination of information and/or training opportunities. This method was considered superior to developing any new bureaucracy of provision, which they felt would dilute limited resources. Using existing networks, such as the partner organizations in this study and their service arms, was seen as not only practical but also a way to lend validity and recognition to any planned efforts by associating the work with these familiar groups and organizations.

In the same vein, focus group discussions recognized value in their own personal and regional networks of peers - noting that a plan should recognize that institutions will continue to rely on their colleagues as a first place of inquiry. Knowing that this was not always the most valuable location for quality assistance, they felt that an effective plan could still incorporate those networks by expanding the knowledge base of their colleagues and the quantity of their collegial connections. Their support for workshops being offered regionally was seen as an opportunity to 'connect' with their regional counterparts, who they felt could be useful as new or expanded colleagues in their efforts, as well as a way of saving time and travel costs.

Perhaps indicative of the self-reliant perspective that the majority of the institutions (small and rural) have adopted over the years, using regionally held workshops with both 'hands-on' and 'self-assessment tools' were considered the most effective. Participants conveyed the importance of attaining a 'final product'

(e.g. a disaster plan, a grant outline, a long range plan, etc.) at the completion or very near the completion of the actual training. Here they cited low numbers of staff and time constraints as the need for this efficiency, even if the result was less thorough.

Because of their perceived isolation from conservation and preservation professionals, many seek preservation information via broad web searches, as well as colleagues. Many then wished for good, accessible sources of preservation and conservation information that they might access easily and without confusion about quality - a characteristic they found difficult to ascertain in ordinary web or colleague inquiries.

5. Recommendations for Future Action

Both the survey results and the focus group meetings identified the highest conservation and preservation priorities for the State of Wisconsin and suggested effective and agreeable methodologies for carrying out actions to meet those needs. The following prioritized plan of action will have a lasting impact on Wisconsin institutions. The implementation of this plan will integrate improved preservation and conservation activities into both the administrative governance and day-to-day activities at several hundred Wisconsin collection institutions.

Just as with most individual institutions' prioritized steps for improvements, this statewide preservation improvement plan first identifies some low-cost or self-initiated steps to complete, and then follows with larger and more resource required initiatives. With funding from an IMLS Connecting to Collections Statewide Implementation grant or a similar allocation, the implementation of the following steps, in this order, over a 2-year period is an achievable goal that will serve the state substantially.

A coordinator of these efforts (an office or individual) can be an important component for successful implementation. To fulfill these steps, this individual or office must be competently empowered to:

- *ensure that coordination and access to portions of the Wisconsin Library Services, Council of University of Wisconsin Libraries System, Wisconsin Historical Society, Wisconsin Federation of Museums and Wisconsin Department of Public Instruction communication networks, conferences and websites are in place and can be utilized;

- *ensure that competent workshop contractors are hired; and

- *communicate as an effective ambassador to these organizations and the Boards of Directors/Trustees and Administrations of multiple types and configurations of institutions.

To fulfill all or many of the components of this plan, organizations with the expertise, familiarity with the regions' institutions and geographical proximity should be employed. Logical, qualified organizations for components of this work would be the nonprofit Midwest Art Conservation Center, and the Wisconsin Historical Society.

The Wisconsin Historical Society's Field Service programming reaches about 1,000 individuals related to Wisconsin collections each year. The WHS Field Services holds 10 regional, educational meetings held throughout the state which utilize Society staff and contractors, along with several workshops in partnership with the Wisconsin Federation of Museums and a statewide, annual conference. In addition, the WHS Field Services maintains a web-based listing of preservation resources and a ListServ, and

partners with the Wisconsin Council for Local History, Wisconsin Association of Historic Preservation Commissions, National Trust for Historic Preservation Midwest Office, Wisconsin Heritage Online, and the Wisconsin Federation of Museums.

The Midwest Art Conservation Center reaches over 1,200 collections managers each year at their 18-20 regional workshops along with multiple conference presentations on topics ranging from disaster planning and response training to writing long range conservation plans and writing grants for preservation projects. Their staff of 10 treatment conservators and preservation specialists are also available at all times to respond to inquiries regarding any collection care issue (proper storage environments, shipping and handling techniques, exhibition materials, object condition issues, etc.) and provide disaster response assistance by phone or email. MACC also lends environmental monitoring equipment and mentors institutions on step-by-step improvements in collections care and best preservation practices.

Both organizations can coordinate and schedule regional educational programming to implement those portions of this strategic plan. The annual conferences and workshop programming of the Wisconsin Federation of Museums, The Wisconsin Library Services and the Wisconsin Library Association also reach hundreds of collections managers each year. There are potential opportunities for collaborations with those groups to schedule conference time and fulfill some of the educational trainings outlined below:

Prioritized Collections Care Improvements for the State of Wisconsin

A) Low-cost, practical steps to set a foundation for improved collections care:

-Advocacy (with examples) to institutions' Boards of Directors/Trustees and Administrations to include the words/concept of *preservation* within their organization's mission statements – to begin governance engagement and dialogue on conservation/preservation issues.

-Encourage institutions to purchase low-cost water detector alarms (\$7-\$10) and place them in and around collection storage, exhibition and any known leakage locations – to immediately and inexpensively reduce one of the most common risks to collections.

-Encourage regular visits and inspections by institution staff/volunteers of their storage rooms/locations – to immediately and inexpensively reduce risk to collections from their highest reported cause of damage.

-Promote this short, simple list of good preservation/conservation information locations – to expand the knowledge base of collegial networks with quality, vetted information without confusion:

- * Canadian Conservation Institute (CCI) Notes
- * Midwest Art Conservation Center (MACC)
- * Wisconsin Historical Society
- * National Park Service (NPS) Conserve-O-Grams
- * Northeast Document Conservation Center (NEDCC)

-Encourage institutions to do a self assessment of their past, current and on-going preservation activities. (i.e. emptying closets for more storage, conversion of an unused bedroom in a historic house to collections' storage, annual spring cleanings, regular maintenance work, weekly dusting of vitrines/cases, changing burnt out light bulbs, etc.) – to set a context for future preservation projects, demonstrating that preservation is ongoing by action (which can be translated into budget line items), and to give context for preservation grant applications.

Implementation methods:

Utilize the existing websites and communication networks (ListSerts, email broadcasts, newsletters, etc.) of the Wisconsin Library Services, Council of University of Wisconsin Libraries System, Wisconsin Historical Society, Wisconsin Federation of Museums and Wisconsin Department of Public Instruction - to list and encourage the above steps.

B) Training Opportunities for paid and volunteer collections managers and curators:

-Hold regional workshops on 'Conducting a Risk Assessment' followed by 'Writing a Disaster Plan' and 'Disaster Response: the Critical First 48 Hours' – to reduce collection risk associated with disasters on a statewide basis.

Workshop - Conducting a Risk Assessment - A 1-day workshop on how to conduct an institutional and collections risk analysis for both natural and man-made disasters, including determining the probability of flooding and fire; reviewing site location and logistics for potential hazards; examining building systems and design for potential dangers; identifying weather risks, pest infestations; managing a mold invasion; identifying, locating and storing potentially toxic materials in both collection and non-collection items and materials; and identifying other factors that pose risks to buildings and collections. This presentation of steps to mitigate potential risks should be used in an overall institutional and collections Disaster Preparedness and Emergency Response Plan. Participants take part in a large, practical exercise involving risk analysis at the host institution site and will receive the tools to self-conduct the assessment at their own institution.

Workshop - Writing a Disaster Plan - A 1-day workshop on how to write a Disaster Preparedness and Emergency Response Plan for institutions with collections, including incorporating the concepts and completed risk assessment from the previous *Conducting a Risk Assessment* workshop. This enables an institution to complete a short, but thorough disaster plan for their cultural institution that recognizes response priorities and the methods for dealing with the different types of disasters that could affect their collections. Participants leave with a draft plan ready for final completion and adoption at their own institution.

Workshop - Disaster Response: The Critical First 48 Hours - A 1-day workshop on how to respond to a disaster during its first 48 hours. The first 48 hours can mean the difference between life and death, as well as the potential for saving significant numbers of collection artifacts. Instructors discuss the first 48 hours in a disaster within a cultural institution, including implementing the institution's disaster plan; documenting a disaster; staff safety versus collections salvage; human psychological factors during a disaster; constantly changing priorities; responding to and informing the public; putting a response team into action; dealing with local, state and Federal officials; insurance and insurance adjusters; and paying

for a disaster. Lecture and Powerpoint are complemented with practical exercises involving role playing in various disaster scenarios.

Implementation methods:

Fund key institution staff/volunteers' attendance at regionally held workshops throughout the state on *Conducting a Risk Assessment* followed by a second set of workshops on *Writing a Disaster Plan* and a third on *Disaster Response: the Critical First 48 Hours* at the same regional locations – promoting attendance via the websites and communication networks (ListServes, email broadcasts, newsletters, etc.) of the Wisconsin Library Services, Council of University of Wisconsin Libraries System, Wisconsin Historical Society, Wisconsin Federation of Museums and Wisconsin Department of Public Instruction.

C) Make statewide improvements to Wisconsin collecting institutions' disaster response and alert networks.

- Utilize the regionally held workshops as a method to strengthen ties among cultural organizations to become their own *regional disaster response teams* – to improve disaster response readiness on a statewide basis.

Implementation methods:

Include time and materials for the workshop participants to exchange contact information and build additional listings for their emergency response plans.

- Assign an institution and allocate resources to maintain the contact database information gained during the surveying portion of the Connecting to Collections/WI assessment and planning grant work or explore alternative communication methods such as a closed ListServ system – to reduce collection risk associated with disasters on a statewide basis through a statewide communication network.

Implementation methods:

Identify and receive commitment from a long-standing institution or government agency to maintain the database of disaster contacts and keep it current and useful as needs evolve.

D) Educate the Boards of Directors/Trustees and Administrations of collecting institutions on the importance of a step-by-step protocol of collections care improvements.

- Promote to the Boards of Directors/Trustees and Administrations the essential, first step of having a General Preservation Assessment Survey conducted for their institution and its valuable role in fund-raising for improvements – to continue and advance governance engagement and dialogue on conservation/preservation issues with a tangible goal.

Implementation methods:

Utilize the existing websites and communication networks (ListServes, email broadcasts, newsletters, etc.) of the Wisconsin Library Services, Council of University of Wisconsin Libraries System, Wisconsin Historical Society, Wisconsin Federation of Museums and Wisconsin Department of Public Instruction to list and encourage the above steps - encouraging the value of self-funding and/or identifying grant funding sources to have a General Preservation Assessment Survey completed.

- Promote to the Boards of Directors/Trustees and Administrations the essential, second step of developing a Long Range Conservation Plan for their institution and its valuable role in fund-raising for improvements – to continue and advance governance engagement and dialogue on conservation/preservation issues with a tangible goal of having a long-term stewardship plan.

Implementation methods:

Utilize the existing websites and communication networks (ListServes, email broadcasts, newsletters, etc.) of the Wisconsin Library Services, Council of University of Wisconsin Libraries System, Wisconsin Historical Society, Wisconsin Federation of Museums and Wisconsin Department of Public Instruction to list and encourage the above steps - encouraging the value of a directed effort to learn how and then to accomplish making this plan.

6. Beyond the Plan

The survey results gained in this study can be used to further preservation and conservation improvements well into the future. The survey results identify multiple areas that can become the focus for trainings, education and the allocation of resources for physical improvements. Just as the plan above begins with 'advocacy' for the concept of *preservation* within organizations' mission statements, continued 'advocacy' for conservation and preservation at the governance and administrative levels of institutions will need to continue.

A good, methodical approach to improved collections care can be adopted by any institution. The most important step towards this end is to have a General Preservation Assessment Survey completed (with its prioritized steps to improvements). The importance of institutions having this survey and prioritized steps cannot be overstated. The prioritized steps set forth improvements that can then be pursued with confidence by the staff or volunteers while the institution's governance, grantors, local governments and community supporters are provided with well-articulated needs and priorities, making their support much more likely.

Further steps beyond this 2-year strategic plan should address several additional areas of need. Although specific needs vary by institution and the implementation of the above steps will spur some institutions to work beyond others, the next steps should include efforts, education and training on the following subjects:

- Encourage institutions to educate the public about conservation/preservation activities through their websites, conservation/preservation activities in exhibitions, donors, trustees, members and friends groups – to demonstrate stewardship while engaging the public about this responsibility and need for support.
- Assistance with obtaining environmental monitoring equipment and training to use devices appropriately – to incorporate best overall practices of collection maintenance into the day-to-day activities of institutions.
- Encourage preservation reformatting initiatives such as preservation photocopying, microfilming, or digitization and preserving digital media, servers, and/or playback equipment – to incorporate best practices of collection maintenance for a fragile and widely held segment of collections.

- Grant writing training/assistance for paid and volunteer collections managers and curators – to empower institutions to receive funding for their own particular conservation/preservation needs and continued improvements. An example workshop on granting is listed below:

Workshop - *Writing Grants for Preservation and Conservation Projects* - A 2-day, comprehensive workshop on grant-writing for conservation-related projects including Overall General Preservation/Conservation Surveys; writing Long Range Preservation Plans; preservation training; obtaining supplies and materials for basic re-housing of collections; HVAC System upgrades; major storage renovations or additions; Object-by-Object detailed surveys of collections; conservation treatments and other large scale or large budget preservation and conservation projects. Related topics include discussing potential public and private funding sources at the Federal, state and local levels; doing an internal review to facilitate presenting the organization in the best possible light; putting all of the pieces together before developing a grant; how to budget; how to develop a realistic proposal; and how to complete a final grant report. The goal of the workshop is for participants to leave the session with a draft proposal.

7. Conclusion

The Wisconsin Connecting to Collections Needs Assessment Planning Grant from the IMLS has enabled this assessment identifying the state's most pressing conservation and preservation needs and the development of this achievable action plan to meet those needs. A cooperative, statewide assembly of Wisconsin's collecting institutions and associations participated in this study and the dialogues needed to form this effective and practical course of action.

The implementation of this plan will integrate improved preservation and conservation activities into both the administrative governance and day-to-day activities across Wisconsin collection institutions. As in all of the nation's states, individual institutions vary in their needs and their abilities to properly provide stewardship of their collections. But the most urgent needs of the vast majority of institutions in Wisconsin have been confirmed here. The allocation of resources to place this plan into action will immediately reduce the risk to the collections at several hundred institutions while setting a foundation of institutional responsibility and support into the future.

Portions of this report and accompanying appendices can become part of an application for an IMLS Statewide Implementation Grant. That grant opportunity is available in the coming months and can be pursued by a single entity with the backing and support of other statewide organizations or by a consortium of nonprofit groups and governmental agencies.

1. Wisconsin Preservation Needs Survey

Your participation in this *Institute for Museum and Library Services - Connecting to Collections* supported survey will influence future collections care funding opportunities from Federal and State agencies. It is important that the needs of your institution be counted in this study. The findings of this survey will be available for you to use in grant applications and other requests for support to your own organization. Participating institutions will be added to a statewide, disaster response network to facilitate aid in the event of natural or man-made emergencies.

As an added incentive, if you **complete this survey by 2/15/2011** your institution will be entered in a drawing for an **unrestricted contribution of \$500**.

This on-line survey will take only a few minutes but will have a lasting impact on Wisconsin's collecting institutions.

We will keep your individual responses completely confidential. Only the aggregate data will be reported; your individual responses will never be published or identified.

Your participation is very important. The data you provide will help communicate the scope and nature of the preservation needs of collections statewide and will guide the efforts of decision-makers and funders to address those needs.

The Wisconsin Department of Public Instruction, Wisconsin Library Services, Wisconsin Federation of Museums, Wisconsin Historical Society, and the Midwest Art Conservation Center thank you for your participation.

* 1. What is the name of your Institution?

* 2. Please fill out the information below.

Your Name:

Title:

Email Address:

Phone Number:

3. Which of the following most accurately describes your institution? (Select all that apply)

- | | | |
|--|---|--|
| <input type="checkbox"/> Aquarium, Zoo, Botanical | <input type="checkbox"/> Science Museum | <input type="checkbox"/> Historic House/Building |
| <input type="checkbox"/> Archaeological Repository | <input type="checkbox"/> Veterans Museum | <input type="checkbox"/> Historical Society |
| <input type="checkbox"/> Archive | <input type="checkbox"/> Museum | <input type="checkbox"/> Library |
| <input type="checkbox"/> Art Museum | <input type="checkbox"/> Cultural Community | <input type="checkbox"/> Park/Recreational Site |
| <input type="checkbox"/> Art & History Museum | <input type="checkbox"/> Foundation | <input type="checkbox"/> Religious |
| <input type="checkbox"/> Native American Museum | <input type="checkbox"/> Gallery | <input type="checkbox"/> University or College |
| <input type="checkbox"/> Natural History Museum | <input type="checkbox"/> Government | |

Other (please specify)

4. Which of the following most closely describes your institution's governance? (Select one)

- ☐ College, University or other Academic entity
- ☐ Local Government (county or municipal)
- ☐ Non-Profit Organization, Foundation or Religious institution
- ☐ Federal
- ☐ State
- ☐ Tribal

Other (please specify)

*** 5. In the event of a Disaster or Emergency occurrence at your location, who should be the primary contact person at your institution?**

Name:

Title:

Email Address:

Phone Number:

*** 6. In the event your location is part of a state or federal disaster declaration zone, assistance is directed by county. In what county or counties is your collection located?**

Please select from the list below:

Primary County

Secondary County (if applicable)

1. How many visitors or users did your institution serve last year? Indicate "0" if you had no visitors or users in a category. Give your best estimate or leave blank if unsure.

Enter numbers without commas.

On-site

Off-site (e.g., traveling exhibitions, bookmobiles, educational programs)

Electronically (e.g., visits to Web site, electronic distribution lists, electronic discussion groups)

2. Does the Mission Statement of your institution include the *preservation* of your collections?

☐ Yes

☐ No

☐ Don't know

3. How many staff, volunteers and Board members are *directly* involved with the care, exhibition and handling of the collections at your institution? (Give your best estimate if unsure)

Paid staff

Volunteers

4. On average, about how long do staff members or volunteers with decision-making responsibility remain with the institution?

☐ Less than 1 year

☐ 1 to 3 years

☐ 3 to 5 years

☐ More than 5 years

5. What was your institution's total annual operating budget for the most recently completed fiscal year?

☐ Less than \$50,000

☐ \$1,000,000 to 5,000,000

☐ \$50,000 to 100,000

☐ \$5,000,000 to 10,000,000

☐ \$100,000 to 500,000

☐ \$10,000,000 or more

☐ \$500,000 to 1,000,000

☐ Don't know

6. Are funds specifically allocated for Conservation/Preservation activities in your annual budget? (Select one)

- ☐ Yes
- ☐ No
- ☐ Don't know

If yes, approximately what dollar amount of the budget is earmarked for Conservation/Preservation activities?

1. Does your institution *monitor* Environmental Conditions (light, temperature, humidity) for your collections? (Select one)

- ☐ Yes, regularly, in representative areas (storage, exhibition, etc.)
- ☐ Yes, regularly, in identified problem areas only
- ☐ Occasionally
- ☐ We used to monitor but stopped when the equipment failed
- ☐ We used to monitor but stopped when that employee left
- ☐ No, environmental conditions are not monitored
- ☐ Don't know

2. Does your institution *control* Temperature for the preservation of your collection? (Select one)

- ☐ Yes, in all areas, all year long
- ☐ In some areas only, all year long
- ☐ In some areas only, winter only
- ☐ In some areas only, summer only
- ☐ No, in no areas
- ☐ Don't know
- ☐ Not applicable

3. Does your institution *control* Relative Humidity for the preservation of your collection? (Select one)

- ☐ Yes, in all areas, all year long
- ☐ In some areas only, all year long
- ☐ In some areas only, winter only
- ☐ In some areas only, summer only
- ☐ No, in no areas
- ☐ Don't know
- ☐ Not applicable

4. Does your institution *control* Light Levels for the preservation of your collection? (Select one)

- ☐ Yes, in all areas
- ☐ In some areas only
- ☐ For some art and artifacts only
- ☐ No, in no areas
- ☐ Don't know
- ☐ Not applicable

5. Describe your collection Storage Area(s). (Select all that apply)

- ☐ Off-site storage facility
- ☐ Separate storage building on-site
- ☐ Separate dedicated storage room/s on-site
- ☐ Items are stored in areas also used for other purpose (e.g., offices, exhibit preparation, breakroom)
- ☐ No storage at all
- ☐ Plans for new/improved storage are in progress
- ☐ All materials (e.g., 3-D /archival /photographic /etc.) are stored together
- ☐ Different kinds of objects are stored separately (eg. dedicated photo storage)

6. A *General Preservation Assessment Survey* is done by a trained Conservator or Preservation Specialist and is based on a visual inspection of the institution as a whole, including the building itself and the areas where the collections are exhibited and stored. (A *General Preservation Assessment Survey* is considered an important first step for federal funding.) Has a General Preservation Assessment Survey been done for your institution?

- ☐ No
- ☐ Yes, of the entire collection, and it is less than 7 years old
- ☐ Yes, of the entire collection, but it is more than 7 years old
- ☐ Don't know

7. A Long-Range Conservation Plan is a document that outlines a multi-year course of action designed to meet an institution's overall preservation needs. Does your institution have a written, Long-Range Conservation Plan?

- ☐ No
- ☐ Yes, and it is updated regularly
- ☐ Yes, but it needs updating
- ☐ No, but one is being developed
- ☐ No, but preservation is addressed in an overall institution plan
- ☐ Don't know

8. A Detailed Conservation Survey (sometimes called an object-by-object or an item specific survey) is based on a Conservator's assessment of the condition of each item in a selected portion of the collection. Have any Detailed Conservation Surveys been done at your institution?

- ☐ No
- ☐ Yes, a portion(s) of the collection had a Detailed Conservation Survey
- ☐ Yes, every portion of the entire collection has had Detailed Conservation Surveys
- ☐ Don't know

9. Does your institution have a written Emergency/Disaster Response Plan that includes the collection?

- ☐ No
- ☐ No, but one is being developed
- ☐ Yes, and it is up-to-date
- ☐ Yes, but it is not up-to-date
- ☐ Don't know

10. If you have a written Emergency/Disaster Response Plan, is your staff trained to carry it out?

- ☐ No, some training is still needed
- ☐ Yes, some training has been provided
- ☐ Yes, training is provided regularly
- ☐ Don't know

1. Which of the following security measures are in place in your institution? (Select all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Collections are insured | <input type="checkbox"/> Locked display cases/vitrines |
| <input type="checkbox"/> Collections are inventoried | <input type="checkbox"/> Locked storage areas |
| <input type="checkbox"/> Collections are photographed | <input type="checkbox"/> Electronic intruder alarms |
| <input type="checkbox"/> Fire/smoke alarms | <input type="checkbox"/> Security hangers on framed works |
| <input type="checkbox"/> Fire suppression system | <input type="checkbox"/> Video monitoring |
| <input type="checkbox"/> Flood/leak/water detectors | <input type="checkbox"/> Security tape/tagging |

2. Are copies of vital collection records (e.g., inventory, catalog, insurance policies) stored offsite? (Select one)

- ☐ Yes
- ☐ Some, but not all
- ☐ No
- ☐ Don't know

3. Which of the following Conservation/Preservation activities are performed for your collections? (Select all that apply)

	Regularly	Occasionally	Planned for future	Not done
Conservation Treatments (e.g., repairs, cleaning, deacidification)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preventive Preservation (e.g., housekeeping, environmental monitoring)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation Management (e.g., planning, grant writing)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation of audio-visual media and playback equipment (e.g., preservation copies of media, maintaining equipment)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation of digital materials and electronic records collections (e.g., maintaining servers and migrating data to current software)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preservation reformatting (e.g., preservation photocopying, microfilming, digitization)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. If the following activities occur, who does them? (Select all that apply)

	Internal Preservation/Conservation staff	Various staff as needed	Volunteers or interns	External Provider
Conservation treatment (e.g., repairs, cleaning, deacidification)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preventive preservation (e.g., housekeeping, environmental monitoring)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preservation management (e.g., planning, grant writing)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preservation of audio-visual media and playback equipment (e.g., preservation copies of media, maintaining equipment)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preservation of digital materials and electronic records collections (e.g., maintaining servers and migrating data to current software)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preservation reformatting (e.g., preservation photocopying, microfilming, digitization)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Has your institution made an application, whether successful or unsuccessful, for Conservation/Preservation funding from any public or private source in the last 3 years?

- ☐ Yes
- ☐ No
- ☐ Don't know

6. If your institution has not applied for a public or private grant to assist Conservation/Preservation activities in the last 3 years, which of the following factors influenced the decision not to apply? (Select all that apply)

- ☐ Unaware of appropriate funding sources
- ☐ Lacked staff time or expertise to complete application
- ☐ Needed to complete project planning or preparation before requesting grant funds
- ☐ Conservation/preservation not an institutional priority
- ☐ Currently have sufficient sources of funding
- ☐ Have applied for grant/s from external sources in the past and have been unsuccessful
- ☐ Don't know

Other (please specify)

7. Does your institution promote awareness of Conservation/Preservation in any of the following ways?

	Yes	No	Planned for future	Don't Know
Educating donors and/or trustees about conservation/preservation activities (e.g., tours, presentations, demonstrations)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Featuring conservation/preservation work on Website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Highlighting conservation/preservation activities in exhibitions or other programs for the public	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Presenting conservation/preservation activities to members' or friends' groups (e.g., in educational programming, printed/promotional materials)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Serving as a source of conservation/preservation information for the public (e.g., responding to queries, providing recommendations)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. What resources do you generally use to answer your Conservation/Preservation questions? (Select all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Colleagues | <input type="checkbox"/> Workshops |
| <input type="checkbox"/> Conferences | <input type="checkbox"/> Publications |
| <input type="checkbox"/> Regional Conservation Centers | <input type="checkbox"/> Canadian Conservation Institute (CCI) Notes |
| <input type="checkbox"/> Library/Librarians | <input type="checkbox"/> State Historic Preservation Office (SHPO) |
| <input type="checkbox"/> Professional Associations | <input type="checkbox"/> National Park Service Conserve-O-Grams |
| <input type="checkbox"/> Independent Conservator(s) | <input type="checkbox"/> ListServes |
| <input type="checkbox"/> State/County Historical Societies | <input type="checkbox"/> Websites |

Other (please specify)

9. Has anyone at your institution received formal instruction or training on Conservation/Preservation issues within the last 2 years?

- ☐ Yes
- ☐ No
- ☐ Don't know

1. Do you believe any artwork(s), artifact(s) or material(s) may be at risk in your collection? (Select all that apply)

	Urgent Risk	At Risk	Not at Risk	Don't Know
Paintings (on canvas, panel, murals)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Art on Paper (watercolors, prints, drawings)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Books and Bound Volumes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unbound Paper (Documents, letters, posters, maps, manuscripts, and ephemera)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Photographic Materials (prints, negatives)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Textiles (costumes, clothing, tapestries, flags, rugs, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sculpture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Decorative Arts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Native American Artifacts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Ethnographic Artifacts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Historical Artifacts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Furniture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Musical Instruments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transportation or Large Machinery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Buildings and Architecture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Motion Picture Film	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Analog Recorded Sound Collections (records, cylinders, cassettes, open reel tape)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Video tape	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Microfilm/microfiche	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digital Materials (server files, CD, DVD, DAT, laser disc, minidisk, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Living Collections (live aquatic/zoological animals, live plants, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Natural Science Specimens (e.g., zoological, botanical, geological)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. How useful would the following Assistance be to you?

	Urgently Needed	Needed	No Need	Don't Know
Obtaining a General Preservation Assessment Survey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Writing a Long-Range Conservation Plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Writing an Emergency/Disaster Response Plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Obtaining environmental monitoring equipment/training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving environmental controls (humidity, heating, a/c)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving security measures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implementing a pest control system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving/expanding storage area(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Obtaining Detailed Conservation Surveys	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conservation Treatments for Art/Artifacts/Materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preserving analog, audio/visual collections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preserving digital collections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving handling and basic collection care techniques	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training on emergency/disaster response	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Writing grants to fund conservation/preservation activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. For those items in your collection that are currently in need of conservation treatment, which factors do you believe have caused the most damage or loss of access? (Select all that apply)

	Significant Damage/Loss	Some Damage/Loss	Minor Damage/Loss
Improper handling or transport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fire (including smoke and soot damage)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water or moisture (e.g., liquid stains, warping)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Airborne particulates or pollutants (e.g., dust)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Light (e.g. fading, discoloration)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improper previous repairs (e.g., tape, glue, paint)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improper storage methods or materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improper exhibition methods or materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mold/mildew	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pests (insect or rodent damage)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical or chemical deterioration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Obsolescence of audio/visual or digital playback equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Theft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vandalism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. If resources and funding became available for improved Conservation/Preservation at your institution, would you devote some staff or volunteer time to help implement improvements?

- ☐ No
- ☐ Yes
- ☐ Don't know

5. Which Delivery methods for Conservation/Preservation instruction would be most effective for your institution?

	Most Effective	Somewhat Effective	Least Effective
Attending collections care workshops presented by conservation experts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to on-line collections care workshops from conservation experts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to written or on-line information and resources from conservation experts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to networks of colleagues/peers to share information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual, on-site visits and instruction by conservation experts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Would you or someone from your organization be willing to attend a focus group meeting with your neighboring Wisconsin institutions to share and discuss your Conservation/Preservation needs?

- ☐ Yes (travel costs and lunch provided)
- ☐ No

7. What other assistance in meeting your Conservation/Preservation needs would be most useful to you?

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